

Gelatin Market by Source (Animal, Plants), By Applications (Food & Beverages, Pharmaceuticals, Health & Nutrition, Cosmetics, Personal Care, Animal Feed), Type (Type A, Type B), Function (Thickener, Stabilizer, Gelling Agent) - Global Forecast to 2029

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Report description:

The global market for gelatin is estimated to be valued at USD 4.0 billion in 2024 and is projected to reach USD 5.6 billion by 2029, at a CAGR of 6.9% during the forecast period. The second-fastest growing application after agriculture applications, in terms of high CAGR, will be cosmetics and personal care products due to their anti-aging, antioxidant, and anti-wrinkle properties. A continued demand for gelatin lies in most of the personal care products, such as lotions, cosmetics, and hair care products like wave-set lotions. It also helps in relieving dryness and pigmentation. The high protein content in gelatin is considered good for hair and nails. With its outstanding bioactivity on human skin, gelatin finds a place in most of the cosmetic preparations. It also has been reported to be safe for a cosmeceutical application. The manufacturers use gelatin in almost every type of beauty and cosmetic preparation starting from creams and powders to lip colors and shampoos. Thus, over time, the symptoms of aging-brought about by altered living and stressful lifestyles-mean high demand for gelatin in cosmetic products.

"The food & beverages segment is projected to dominate the market in the application segment during the forecast period."

Gelatin is obtained from by-products of animals and used in almost all bakery and confectionery foodstuffs in the world, not only for its gelling properties but also to improve flavor and texture. Typical uses of gelatin include in gummy candies, desserts, cakes, marshmallows, ice cream, dips, and sauces-working therein as a gelling, emulsifying, and stabilizing agent. The powdered form of gelatin is usually applied in bakery products.

Gelatin finds a place in both alcoholic and non-alcoholic beverages, like fruit juices, fruit wine, cider, and beer. Most of the drinks always contain impurities and insoluble matter; gelatin is added to clarify them through a process called fining. The gelatin joins with the hydrocolloids and other proteins to reduce turbidity and astringency but does not affect flavor. Besides, gelatin may act

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as a sugar substitute in many drinks. Growing demand for fortified beverages, fruit juices, and alcoholic drinks is likely to boost the global demand for gelatin in this application segment.

"The thickener sub-segment in the function segment is estimated to grow at a significant CAGR during the forecast period."

The thickener segment is also seeing growth in the market during the forecast period. Gelatin is valued on account of its functionality to enhance food texture and taste, while being itself tasteless, odorless, and colorless. This makes it quite applicable in products such as yogurt, cheese, cakes, and ice cream. Companies such as Lapi Gelatine S.p.A. (Italy) and Gelita AG (Germany) produce gelatin specifically used as a thickening agent in food and beverages.

"North America has consistently held a substantial market share within the gelatin sector during the study period."

The North American market for gelatin is thriving thanks to a strong biopharmaceutical industry, the wide acceptance of gelatin in pharma applications, easy access to raw materials, and the presence of major players. The large pig population in the region, the US, and, as per the latest number from the USDA in March 2022, it stands at 72.2 million provides the constant raw material requirement.

In addition, the increasing elderly population and the spiraling cases of chronic disorders and other infectious diseases are propelling pharmaceutical sales in North America. Demand is also witnessing a surge for gelatins specifically in the pharmaceutical space, and capsule manufacturers are one of the prime consumers. Furthermore, the utilization of gelatin in hemostats also augments with the increasing cases of traumatic bleeding.

However, the North American industry of pharmaceuticals is unable to optimize these positives as the government interferes in cost-cutting to lower the amount spent on healthcare, which has been one of the most significant moves. And so, pharma manufacturers geographically rebase to more cost-effective production locations like Brazil, India, and China.

Companies like Darling Ingredients, Inc., Great Lakes Gelatin, and Aspire Pharmaceuticals have a vast customer base, while the distribution network is well-established, serving the whole of North America.

The break-up of the profile of primary participants in the gelatin market:

- By Company Type: Tier 1 - 25%, Tier 2 - 45%, and Tier 3 - 30%
- By Designation: CXO's - 20%, Managers - 50%, Executives- 30%
- By Region: North America - 25%, Europe - 20%, Asia Pacific - 30%, South America - 15% and Rest of the World -10%

Prominent companies in the market include Darling Ingredients (US), Tessenderlo Group (Belgium), GELITA AG (Germany), Nitta Gelatin Inc. (Japan), Lapi Gelatine S.p.a. (Italy), India Gelatine & Chemicals Ltd. (India), Narmada Gelatines Limited (India), Nippi. Inc. (Japan), Weishardt (France), Trobas Gelatine B.V. (Netherlands), Sterling Biotech Ltd (India), Roxlor (US), Suheung (South Korea), Ewald-Gelatin GmbH (Germany), Geltech Co., Ltd (Korea).

Other players include Gelken (China), Kenney & Ross Limited (Canada), Jellice Gelatin & Collagen (Netherlands), Athos Collagen Pvt. Ltd (India), ITALGEL S.p.a. (Italy), Foodmate Co., Ltd (China), Xushang Gelatin Co., Ltd (China), ElNasr4Gelatin (Saudi Arabia), Boom Gelatin (China), Baotou Dongbao Bio-Tech Co., Ltd. (China).

Research Coverage:

This research report categorizes the gelatin market by Source (animals, plants), by type (type A, type B), by applications (food & beverages, pharmaceuticals, cosmetics & personal care, health & nutrition, animal feed), by function (thickeners, stabilizers, gelling agents) and by region (North America, Europe, Asia Pacific, South America, RoW). The scope of the report covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the gelatin market. A detailed analysis of the key industry players has been done to provide insights into their business overview, services, key strategies, contracts, partnerships, and agreements. New service launches, mergers and acquisitions, and recent developments associated with the gelatin market. Competitive analysis of upcoming startups in the gelatin market ecosystem is covered in this report.

Reasons to buy this report:

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall gelatin market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also

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helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

- Analysis of key drivers (Increasing use of gelatin in biomedical applications), restraints (cultural restrictions), opportunities (Changing lifestyles and food habits), and challenges (Animal-borne diseases) influencing the growth of the gelatin market.
- New product launch/Innovation: Detailed insights on research & development activities and new product launches in the gelatin market.
- Market Development: Comprehensive information about lucrative markets - the report analyzes the gelatin market across varied regions.
- Market Diversification: Exhaustive information about new services, untapped geographies, recent developments, and investments in the gelatin market.
- Competitive Assessment: In-depth assessment of market shares, growth strategies, and product offerings of leading players like Darling Ingredients (US), Tessenlo Group (Belgium), GELITA AG (Germany), Nitta Gelatin Inc. (Japan), Lapi Gelatine S.p.a. (Italy), India Gelatine & Chemicals Ltd. (India) and others in the gelatin market strategies.

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